



Using Rating Integration – SEMCAT

*NOTE: The rating software must be installed on your workstation and setup in Partner XE prior to completing these steps. If the software is installed but is not set up in Partner XE, please refer to FAQ: How to set up Partner XE to integrate with SEMCAT

Partner XE to SEMCAT

1. Search for the policy you would like to rate from the Policies section of Partner XE.

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(Policy No.	Contains '12')											10 Row
Sort Name	Client Name	Policy Number	LOB	Policy Status	Effective Date	Expiration Date	*Policy Premium	Producer	CSR	Company		
Starkey 2	Jessalyn Marie Starkey	ASSIGN201103031453423126	AUTOP	Active	3/3/2011	3/3/2014	(\$0.00)	Candace Starkey	Bryce Lee	XYZ Non Auto		
Sizemore	Fom Sizemore	ASSIGN201202091431391087	HLTH	Active	2/9/2012	2/9/2022	\$1,434.00	Bryce Lee	Emma Peal	Blue Cross & Blue Shield o	f Ohio	
Thomas .	Jerry Thomas	ASSIGN201202091436195158	MHOME	Active	2/9/2013	2/9/2014	\$500.00	Bryce Lee	Emma Peal	PROGRESSIVE CASUALTY	INS CO	
2395 2	2395	ASSIGN201210051148282584	BOP	Active	10/8/2012	10/8/2013	(\$0.00)	Gary P. Bower	Emma Peal	FAIRMONT INS CO		
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Adams G (Greg Adams	ASSIGN201211091127305103	HOME	Active	11/12/2012	11/12/2013	(\$0.00)	Bryce Lee	Emma Peal	ARBELLA MUTUAL INS CO		
Trump	Ashley Trump	ASSIGN201305241339446712	AUTOP	Active	5/17/2013	5/17/2014	\$1,400.00	Bryce Lee	Bryce Lee	PROGRESSIVE CASUALTY	INS CO	
MASSIE	Robert Massie	test123	AUTOP	Chg Quote	7/15/2010	7/15/2011	\$1,662.00	Gary P. Bower		PROGRESSIVE AMERICAN	I INS CO	
Barnes H	Heidi Barnes	ASSIGN201101201125085545	AUTOP	New Quote	2/1/2011	8/1/2011	(\$0.00)	Gary P. Bower	Bobbi L. Sharon	ABC National Mutual		
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ME Policies without Earthqual			Primary Address						C	ontact Info	l 🔊 🦲 🎒 👂 👘	
Ashley Trum	<u>, S</u>							Phone	(305) 221-7699)		v 🚽 🖬 🖬
12 W. Front St	Ste.3							Fax E Mail	te cott@eie war	a.com		
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2. To open the Client Profile to the Policies section, click on the policy hyperlink in the Client Summary.





3. Highlight the policy you would like to rate and go to Tools then Rate Policy.

😫 Client Profile	e - Ashley Tr	rump - (TR12)	1081	85126228]						
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4. The Select Rating Programs window will appear. Check the box and Click OK.

Select Rating Programs		
Selected Rating Program		
◆ Allied Strategy / SEMCAT		
1 item will be added.		
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5. The Rating Integrator window will appear. Select one of the options listed and click on the Rate hyperlink at the bottom of the screen.

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6. The rating software will open as a web application and you will be prompted to sign in. If you do not know your username and / or password, you will want to contact the software provider.

7. Your policy will be imported from Partner XE into SEMCAT.

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Steps: ① Edit Contact > ② Quote Carrier *	() Quote Results
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Name: REAL A THOMPSON I Name: PETRONA THOMPSON	
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55N: 334-21-9909 55N: 909-23-8745	

8. Follow the normal procedure to retrieve your results within SEMCAT.